

# LexisNexis PCLaw® Release Notes

Version 16

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PCLaw®

Version 16

Release Date: August 1, 2017

## PCLaw® 16 Release Notes

PCLaw® is available either via download or on CD\*. A download link appears in your product key email. To obtain a CD, call Sales at 800-328-2898.



**NOTE** PCLaw service packs and hot fixes are only available by download, and not available on CD. For assistance in downloading service packs or hot fixes, please visit the [Support Center](#), contact your LexisNexis Certified Independent Consultant (CIC), or call LexisNexis Technical Support at 800-387-9785.

## Before You Install



**CAUTION** The following information is applicable to anyone NOT on the PCLaw 16 platform

Be sure to do the following before installing PCLaw® 16:

- Check the minimum recommended Server and Workstation [system requirements](#) and ensure your host system meets them.
- Review the [PCLaw 16 Installation Guide](#).
- Review the [Getting Started video](#) for a preview of the installation process.
- Perform a complete backup on your PCLaw data files and documents.
- Close PCLaw and all open applications on your computer.
- Ensure that you are installing the program with administrative permissions/rights.
- Existing PCLaw Users:
  - Please ensure that you have completed the Verify Data Integrity process or used the PCLaw SQL PreCheck Tool. For more information, refer to the [PCLaw 16 Installation Guide](#).
  - Please generate and compare the balances of the following reports immediately **Before and After** the PCLaw version 15 or version 16 installation. If they do not match, please contact customer support at 1-800-387-9785.
    - General Bank Journal - Select **Reports > Journal > General Bank > Other** tab and then select **Totals Only**.
    - Trust Bank Journal - Select **Reports > Journal > Trust Bank > Other** tab and then select **Totals Only**.
    - \*Client Ledger - Select **Reports > Client > Ledger**, select **Firm Totals Only**, and then click **OK**.
    - \*Billing Fees Journal - Select **Reports > Journal > Billing (Fees)**, select **Firm Totals Only** and then click **OK**.

After running each one of the above reports, record the balances or print the report to compare the balances.



**NOTE** Compare the Accounts Receivable balance on the Client Ledger and Billing Fees Journal immediately **Before and After** the PCLaw version 15 or version 16 installation is completed as the Accounts Receivable must always match. If the Accounts Recievable do not match, please contact support at 1-800-387-9785.

## What's new?

The following features and/or enhancements are new in PCLaw 16:

### Version 16.1

#### SQL Database

PCLaw 16.1 continues to build on the enhancements released in PCLaw 16.0. It also builds on the technology refresh introduced in version 15 by migrating the core database to Microsoft SQL Server.

#### E-mail Past Due Notices

The Invoice/Past Due E-mail Queue (formerly Invoice E-mail Queue) provides an easy way to create and e-mail Invoices as well as Past Due Notices. E-mail templates allow you to pre-populate the body of an Invoice or Past Due e-mail without having to copy and paste or re-key the message each time. Included in the Queue are filtering, sorting and previewing options for both sent and unsent items as well as an *Invoice E-Mail Queue* and a *Past Due E-mail Queue* report.

#### Visual Analytics (Charts) for Billing, Payment & Account Receivable Data

Billing, Payment, and Account Receivable Data can now be viewed in charts and graphs (Pie, Line, Bar, Column) without having to look at detailed reports. Charts and graphs can be created to show variables such as Billing by Responsible Lawyer, Payments Received by Responsible Lawyer by Type of Law or Accounts Receivable by Responsible Lawyer. Charts can also be printed or saved as images for use in other programs.

#### Drill Down on Charts

Users can now drill down on charts to get to the underlying data for further analysis.

#### Resize Charts

Users can resize a chart on the screen for better viewing and consumption of the data.

#### Remove saved Chart Selections

Previously saved chart selections can easily be removed from the frequently used chart list.

### Version 16.0

#### Charts (Visual Analytics)

The new "Charts" feature in PCLaw allows users to view Time and Fee Data in charts and graphs (Pie, Line, Bar, Column) without having to look at the detailed reports. Accessible from the pull-down menu at the top of PCLaw, charts and graphs can be created to show variables such as Time in Dollars for 2016 by Working Lawyer by Task Code or Time in Hours for 2016 by Responsible Lawyer by Type of Law. Several other variables and filtering options are also available to help you narrow down the scope of the data you would like to view. Charts can be printed or

saved as images for use in presentations at a later time. This feature is controlled by user security and can be made available or removed from users as required.

### View Productivity Reports in Excel

PCLaw Productivity Reports can now be exported to Microsoft Excel via the Excel icon located on the toolbar at the top of the report. Exporting data to Excel provides the ability to further analyze and report on client, billing and collections data within PCLaw.

### Simplified Template Editor with Element Sizing and Positioning Tool

The PCLaw Template Editor opens with an overview window that provides some basic instructions about getting started. It also includes an “Element Sizing and Positioning Tool” to help you manipulate the positioning of elements on the template along with options to change the font face, font size and font style of the entire template or sections of the template with just a few steps. This new addition to template editor appears automatically upon opening a template and is also accessible under the view pull-down menu.

### View Last Receipt Date in Matter Manager

The Summary tab of Matter manager now displays a “Last Receipt” date button, allowing you to have all client accounting information at your fingertips from the summary tab.

### Client Work-in-Progress Report

The character limit for client name on the Client Work-in-Progress Report has been increased to 90 Characters to assist with viewing longer client names easily.

### Changing G/L accounts on Paid Payable Entries (Accrual Systems)

If a Payable Entry was posted to an incorrect G/L account and subsequently paid, you can easily correct it by opening the Payable entry, changing the G/L account to what it should be and choosing Ok to save the change. PCLaw provides this ability on Accrual systems if the month has not been closed.

## Issues Addressed

The following issues have been addressed in PCLaw:

### Version 16.1

#### Accounts Payable

6792991 Searching for a vendor on the Process Payable window has been optimized to prevent PCLaw from freezing and terminating unexpectedly.

#### Billing

6000551 If you specify interest to be calculated based on a future date for a Past Due Notice, it will calculate to the date specified and not the current date.

6499411 The Settlement Statement no longer displays a GST amount when there are no entries on the report.

6777342 The description for Transaction Levy transactions are displayed correctly on bills and prebills.

6806784 The Pre-Billing function has been optimized for better performance.

6819642 If **Show Full Amount of Each Charge on Invoice** is specified on split matters, the charges are displayed on the invoices as expected.

6842743 If pre-bills are set to sort by responsible lawyer, they will be printed in the same order as expected.

6885102, 6885092 Disbursements that use explanation codes for **Special Fees** appear on invoices as expected.

6899639 When clients with multiple matters are billed with **new invoice for each client** selected, if there are **no charge** entries on the file, they will not appear on the invoice.

#### Calendar

5577794 On a recurring calendar event, if you select specify that PCLaw should make an adjustment if date falls on a weekend, the adjustment will be made as specified.

6713749 If you enable the filter option on the calendar to show both completed and uncompleted To Do's, the filter will display the entries as expected.

6835138 Removing a recurring To Do no longer causes PCLaw to freeze

#### Conflict

6623793 If a conflict search returns a large number of results, it no longer causes PCLaw to terminate unexpectedly.

## Version 16.1

### Contact Manager

6751124 Using the search field in contact manager no longer causes PCLaw to terminate unexpectedly

### Data Entry

5061877 Opening receipts where an invoice was paid and the overpayment was refunded to the client no longer shows the client refund as an unallocated amount.

5854771 If you enter a client payment that results in an overpayment to retainer and you change the amount of the receipt, the amount added to retainer will also adjust as expected.

6832411 The tabs on the register has been optimized for better performance.

6876073 Memorized transactions use the correct explanation as expected.

### Matter/Matter Manager

6824246 Saving notes on matters through matter manager has been optimized

6826668 Matter Manager has been optimized for better performance when matters with a large number of time entries and time entry notes are accessed.

6845860 If Auto Disbursement as a percentage of fees is part of a matter bill setting, upon adding the bill setting to a matter, an error message will not be produced.

6891103 The opposing Lawyer token displays the name as expected on case labels

6891194 An error message no longer appears if you create a new matter immediately after closing an existing matter

### Options

6827490 If users have restrictions in Advanced Security for Time Entries and the Time Entry Advisor function is active, PCLaw no longer freezes when users exit the software.

6831244 Changing a Trust bank Account name in Options > Lists > Bank Accounts also changes the name in the General Ledger as expected.

### Reports

5698622 The Billing Realization report now displays adjustments as expected for requested bills that have a discount applied.

6858629 If the Minimum Retainer field is added to the client summary report layout, upon generating the client summary report, the minimum retainer balance set in matter manager will be displayed as expected.



## Version 16.1

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|---------|---|
| 6882626 | Removing a matter opening balance also removed it from the client ledger report as expected.  |
| 6909779 | The G/L Reconciliation Report displays disbursements correctly on <b>Modified Cash Systems</b> where <b>Separate Hard and Client Soft Costs</b> is enabled. |
| 6914323 | The client summary report no longer displays a negative A/R balance after a general retainer is entered.  |

### Tools

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|---------|---|
| 6812441 | Receipts with a payment method of Direct Deposit now display in the Bank Reconciliation if Deposit Slips is on. |
| 6911309 | The Bank Reconciliation Report correctly displays the matters for the bank entries.                             |

## Version 16.0

### Accounts Payable

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|------------------|---|
| 5657007          | If The GST amount was changed when a payable was entered, upon opening the entry in the register you will see the balances as expected. |
| 6712499, 6721821 | The processing of payable entries has been optimized for better performance.  |
| 6784757          | Processing a partial payment on a payable where GST was calculated no longer displays an error message.                                 |

### Billing

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|---------|--|
| 5765400 | If you include previously recorded charges onto a quickbill, the client ledger will no longer show a line item with a zero dollar fee.   |
| 6517818 | If you undo an invoice in which a payment from trust applied and then redo the invoice via quickbill using the previously used invoice number, the trust transfer payment screen will correctly display the invoice number specified at the time of billing. |
| 6448711 | Exceeding estimated Fee prompt message is generated for all Matters exceeding Estimate Limit during mass bill.   |
| 6691379 | Creating bill with unrecorded disbursements has been optimized.  |
| 6730927 | Writing off disbursements no longer enters a negative Fee entry on the client ledger.  |
| 6739164 | Electronic billing file is successfully created for split matters.   |

## Version 16.0

6830454, 6831117 On matters set up for task-based billing, an error message is no longer generated when pre-billing or billing time entries with the Task Code "BW".

6818647 GST on disbursements is calculated based on the total of all disbursements as expected.

### Contact Manager

6801652 The export clients from Contact Manager to .CSV no longer produces an error message.

### Data Entry

6117617 If you change the Tax code on a check to "P" and then change the amount of the check, the explanation of the check allocations will no longer be affected.

6161820 Changes are now saved as expected when delay post is used.

6644192 If a retainer was recorded using a G/L other than the default G/L account, PCLaw will allow you to change the entry without an error message.

6697159 The Summary Section on the check screen is updated as expected when a check is printed.

6731424 When correcting a time entry in the register, if you change the matter number, the client name, lawyer and rate will adjust as expected based on the matter chosen.

6743587 The process Payable window no longer displays duplicate payables.

6772499 Temp files created when opening and changing entries are cleaned up when you close the entry.

6778543, 6810515 If you create a general check and select "Include in A/P" along with a "Z" code, you can save the entry without error.

6800504, 6821043 Entering Expense recoveries will be saved if they are allocated to the Client Disbursement Recovery G/L Account.

6825357 Entering a Firm receipt with a "Z" code no longer produces an error message

### G/L

6738047 The G/L Statement closing balance will match the Trust Bank Journal and Client Trust Ledger when they are generated for "Totals Only".

6796173 Exporting the General Ledger Report to QuickBooks no longer produces an error message.

### Matter/Matter Manager

5928913 Changes to the billing address of a multi-mattered client applies to other matters if you select apply changes to matters for this client.

## Version 16.0

6509167	Re-closing a matter using a previously closed matter number will no longer lose the auto numbering sequence for closed matter numbers.
6703289	If you create a matter and choose the copy address from list, you will no longer receive an error message when saving the file.
6721300	Closing a matter where a trust to general transfer has occurred and the trust transaction is reconciled produces a warning that there is a trust bank item along with an uncleared general bank item.
6726168	Editing Time Entries through Matter Manager (Time Tab) has been optimized for better performance.
6732386, 6800501	The settings for Split Lawyer charges is saved as expected in Matter Manager.
6800690	The Matter Export function includes data from custom tabs associated to the matter.

### Misc

6687970	Bank entries with more than 800 allocations will no longer cause PCLaw to crash.
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### Reports

5888040	The Client Accounting Ledger no longer shows a negative retainer if the receipts were entered on the opening balances tab for the matter.
6666777	"Matters with Balances greater than or equal to" option works when a sort method is used under the Matters tab.
6715759	All Trust Banks are shown for Matters with over 10 bank accounts on the Client Trust Listing.

### Tools

6713601	Lawyer Overview List matches the Lawyer Overview screen.
6779831	The Reprint bank report function on the bank reconciliation tool has been optimized.
6824058	If you change the amount paid on an invoice that was entered in the opening balances tab of Matter manager, the A/R reports will match as expected.